

Joint Metro Region

International Community

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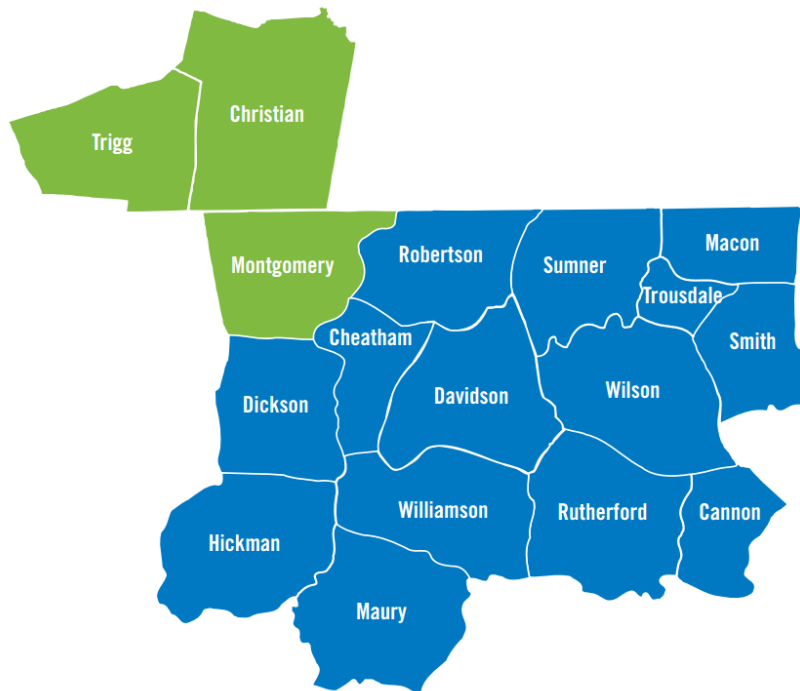


THE RESEARCH CENTER

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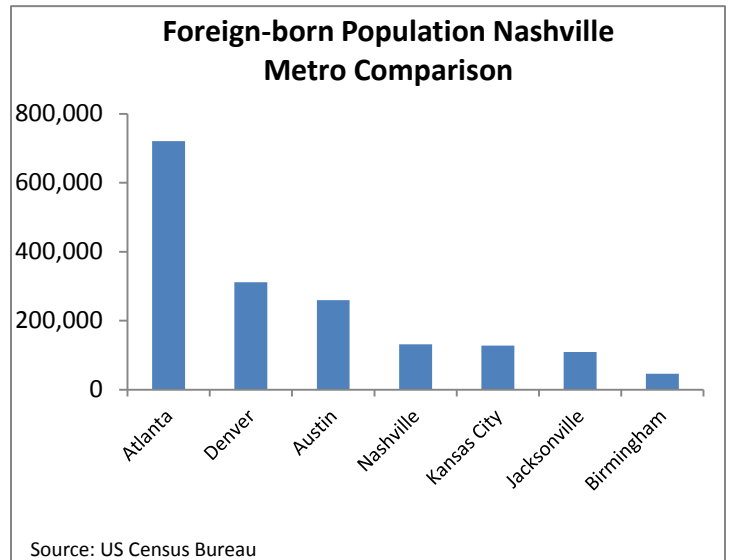
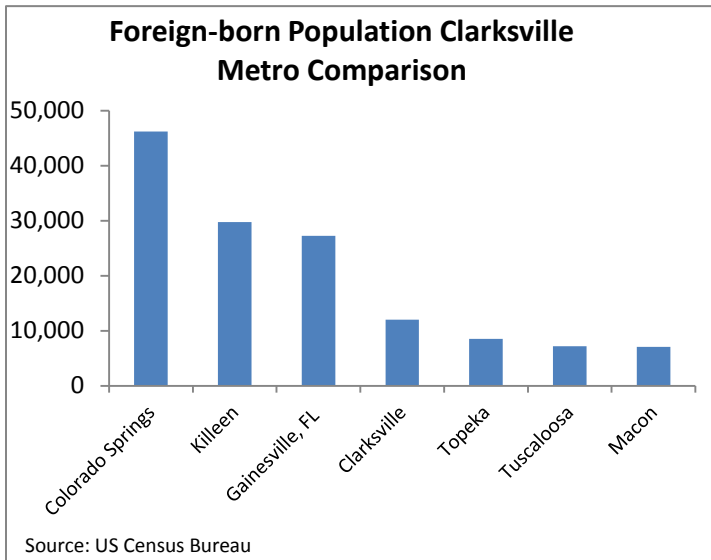


The Joint Metro Region of Nashville-Clarksville comprises one of the most dynamic and growing areas in a multi-state area. The Nashville Metropolitan Statistical Area and the Clarksville Metropolitan Statistical Area together represent a vigorous, vibrant and unusual, complementary blend of assets and attributes.

The **JMR Nashville-Clarksville** is one of a few select adjacent regions with unique characteristics such as found in this area. One of those important aspects is how the region interacts with the rest of the world-for households, individuals, workers, businesses and institutions. This research focuses on a number of those topics. The Joint Metro Region of Nashville-Clarksville comprises one of the most dynamic and growing areas in a multi-state area. The Nashville MSA and the Clarksville MSA together operate in some ways that mirror other dual metro areas in the nation and in some ways perform quite differently. Through this analysis, The Research Center addresses important, and internationally-oriented, aspects of the Nashville-Clarksville Joint Metro Region and how these functional joined regions together contribute to economic and social gains greater than the sum of their parts.

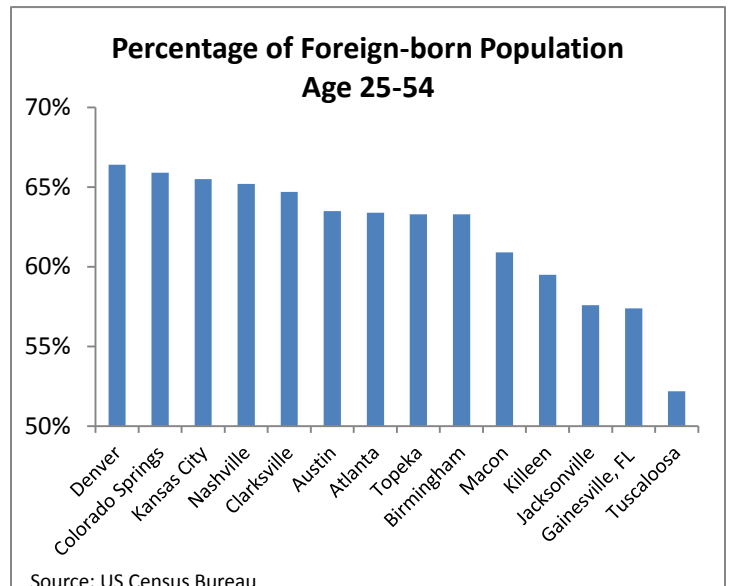
Nashville-Clarksville Joint Metro Region as an International Community

The international aspects of the Joint Metro Region of Clarksville and Nashville are important contributors to the area’s cultural vitality and economic success. A significant international population is a part of both areas for many reasons, chief among which area a large military presence, many higher education institutions, major international firms, and a diversified economy with high rates of job creation. These factors not only have added to the international population of Middle Tennessee over recent years but have generated a wide cross section of roles and occupations that those individuals have served in. On the basis of absolute numbers, Clarksville is home to 12,054 foreign-born persons, placing it in the middle among the comparison set of MSAs in the Joint Metro Regions. Nashville, likewise, stands near the middle in absolute numbers of immigrants. On a percentage basis, the Clarksville MSA has approximately a 4.4% representation of foreign-born and the Nashville MSA at 7.5% of the total population.



Key forces in migration are the effects of “push” and “pull.” Push forces are those elements of life in an origin country which serve as disincentives to remain, from lack of opportunity to even reasons of fear of harm for refugee populations. Pull forces then offer a counterbalance of opportunity across those same variables of importance to the migrating individual.

Just as the Nashville-Clarksville Joint Metro Region serve as an important destination to relocating population from domestic sources across the U.S., so also the economic vitality and quality of place and life, along with unique features such as



military presence, serve as major draws to attract newcomers from throughout the world. Many persons, unsurprisingly, are drawn by employment opportunity in a region that has long experienced notable job gains. The presence of a rather high share of foreign-born persons in the prime working age group, therefore, is a testimony to the reasons for this migration to occur.

Integration of International Community

Integration of foreign-born populations into new communities is shaped by processes that address economic, social and cultural dynamics of newcomers and the welcoming area itself. Integration involves adjustment by immigrants and host community to forge a society of inclusion and opportunity. Various measures of integration include language proficiency, socioeconomic attainment, civic engagement, residential patterns, and social interaction with the wider community. Even so, full integration into society typically occurs only into the second and even third generation in the new location. Mutual adaptation in which residents only minimally identify with national origins and these bring no adversity of opportunity to individuals are the culmination of that integration process.

Across comparisons of similar joint metro regions, several distinctive characteristics of the Nashville-Clarksville region emerge. Certainly, Clarksville’s long history as an economic center and home to a major military installation has provided an institutional infrastructure around which international populations and interests coalesced. From the 19th century role in agricultural trade and higher education, Clarksville has developed ties that reached nationally and beyond. Fort Campbell’s creation in the 1940s provided impetus for ongoing relationships with international travel and populations. Economic development over the past quarter century has resulted in links to major international corporations with local investments and staffing. Altogether, Clarksville’s history is one that provides for many of the key elements for ensuring successful integration of immigrant populations.

Workforce and Immigrant Integration

The consistently strong economic performance of the Nashville-Clarksville Joint Metro Region is highlighted through a number of features- business relocation and expansion, growth in Gross Product, gains in personal income, and net growth in employment. Several features of the experience of this area reveal highly favorable performance among the foreign-born populations in comparison with other Joint Metro Regions. Labor force participation of working age population is one of the most fundamental. The data shows that approximately 65% of Clarksville’s foreign-born population participates in the workforce which conforms closely to the level of participation in the working age population overall.

Notable among the characteristics of the Nashville-Clarksville Joint Metro Region are levels of self-employment in the workforce overall that are higher than national levels. The entrepreneurial activity manifested in many ways through many sectors stands as one of the important ways that this area historically has been able to recover quickly from economic

Percentage of Foreign-born That are Self-employed

Clarksville	11.2
Austin	8.8
Atlanta	8.1
Nashville	7.7
Colorado Springs	7.7
Birmingham	7.3
Killeen	7.1
Denver	6.6
Macon	6.2
Kansas City	5.5
Topeka	5.3
Gainesville	5.3
Tuscaloosa	5.2
Jacksonville	5.1

Source: US Census Bureau

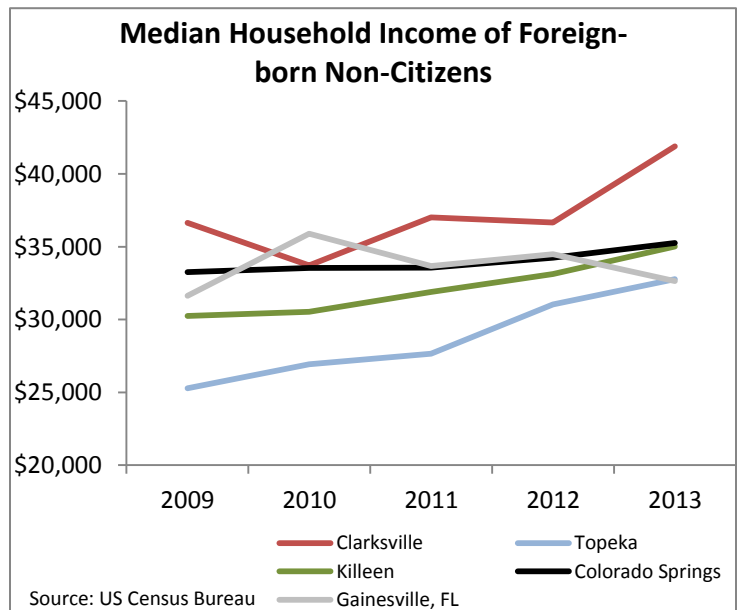
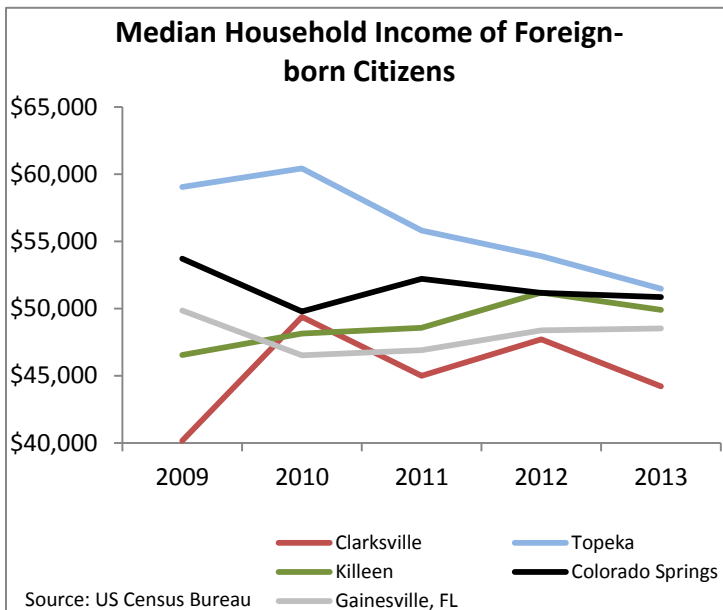
downturn and to illustrate the kinds of nimbleness and innovation that have resulted in diverse and unique industry clusters throughout the region. The high levels of self-employment hold for the foreign-born populations of this area just as for the population at large relative to other Joint Metro Regions. In addition to employment at high levels in a given working age population and the distribution of self-employed compared with payroll employees, earnings of a workforce overall are measures that relate both to the value of output of industries and the quality of a workforce. In the Nashville and Clarksville areas, the median annual earnings of the foreign-born point to favorable earnings characteristics in relation to the other comparison regions.

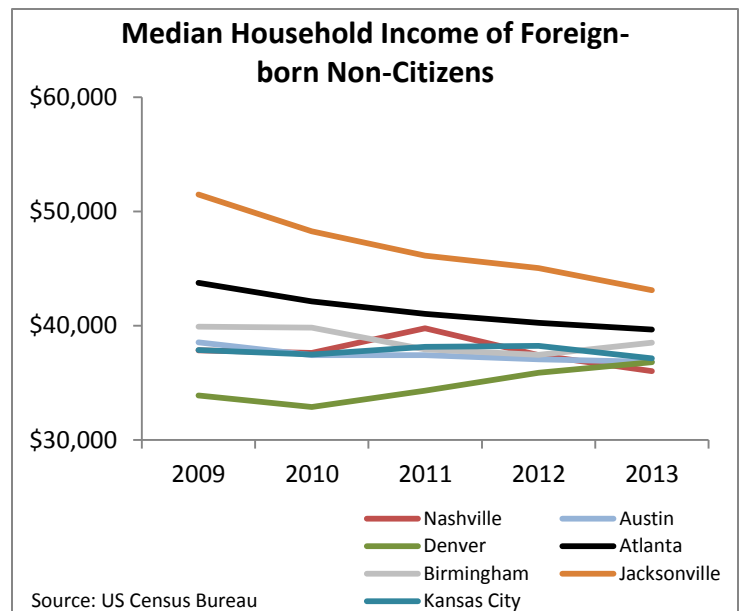
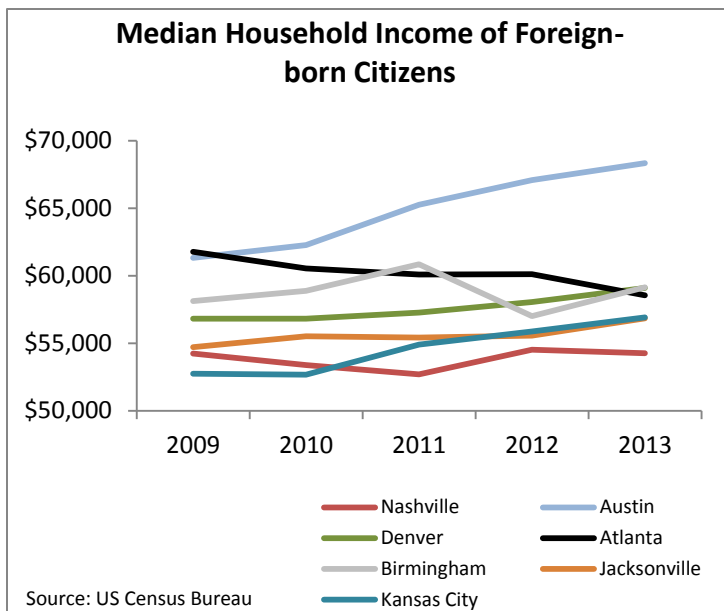
Income levels of foreign-born population are important indicators of achievement of those persons in society. The ability to experience economic mobility and spending power are features that secure stability and cross-generational gains in any population. The median income of foreign-born population serves as a key measure of accomplishment in economic terms. Interestingly, the difference between incomes of those foreign-born that are citizens and those that are not is large in Nashville compared to Clarksville where the differential is very small for other paired regions. While citizenship status is typically correlated with higher levels of integration and economic mobility, the closeness of incomes between the groups in Clarksville presents an unusual finding as does the fact that foreign-born citizen incomes are among the lower of those represented while non-citizen incomes are among the highest.

Median Household Income of Foreign-born Population

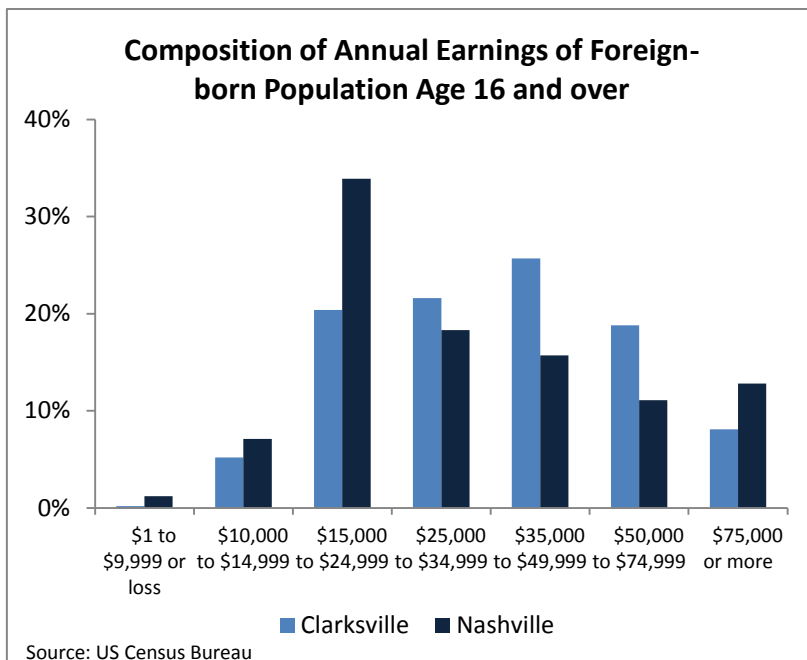
Metro	Foreign-born; citizen	Foreign-born; non-citizen
Gainesville	\$48,505	\$32,642
Topeka	\$51,471	\$32,781
Killeen	\$49,886	\$35,010
Colorado Springs	\$50,851	\$35,255
Nashville	\$54,262	\$36,027
Denver	\$59,087	\$36,812
Austin	\$68,344	\$36,829
Kansas City	\$56,924	\$37,147
Birmingham	\$59,143	\$38,526
Atlanta	\$58,546	\$39,673
Clarksville	\$44,199	\$41,883
Jacksonville	\$56,852	\$43,103

Source: US Census Bureau





A comparison of the median earnings of foreign-born males gives an additional insight into the ways that Clarksville immigrant populations represent a group that is more uniform in its performance in earnings outcomes, more advanced in overall level of earnings, and as later data show, more evenly distributed across middle income groups than is the immigrant population of earners in Nashville or many other metro regions. The earnings distribution provides a means to assess and interpolate understanding of occupations and industry paths that are common among foreign-born workforce in a region. A comparison of this distribution for Nashville and Clarksville yields interesting examples of achievement and mobility. For Clarksville Metro immigrants, the spread of earnings is solidly strong across a group of middle class and middle income sets. Meanwhile, share of earnings for Nashville Immigrants falls much more in a bifurcated pattern to lower and higher wages.



Median Annual Earnings of Foreign-born Males

Gainesville	\$42,485
Jacksonville	\$41,667
Clarksville	\$39,056
Colorado Springs	\$37,742
Denver	\$36,822
Kansas City	\$35,803
Killeen	\$34,912
Atlanta	\$34,459
Austin	\$32,542
Topeka	\$29,750
Macon	\$27,600
Nashville	\$27,369
Birmingham	\$26,495
Tuscaloosa	\$22,648

Source: US Census Bureau

A high correlation between earnings and education is a recognized pattern nationally and locally as skills requirements rise and workers recognize that educational advancement increasingly proves the most efficient path to heightened earnings. In assessing educational attainment by discrete levels, data show that Clarksville tops the list of Joint Metro Regions for share of population that hold a high school diploma as their highest level of education. This notable aspect of the Clarksville immigrant experience corresponds to other features of integration which this research presents. Meanwhile, high school graduate status as the highest level of completion sees Nashville immigrants placed much lower in the comparison group.

**Percentage Foreign-Born 25 and Over That are
have Some College of Bachelor’s Degree**

Jacksonville	49.5
Macon	47.0
Gainesville	44.8
Colorado Springs	42.1
Clarksville	39.5
Atlanta	39.1
Killeen	36.4
Kansas City	34.5
Nashville	34.0
Denver	32.7
Austin	31.7
Birmingham	30.2
Topeka	28.0
Tuscaloosa	26.3

Source: US Census Bureau

**Percentage Foreign-Born 25 and Over
That are High School Graduates**

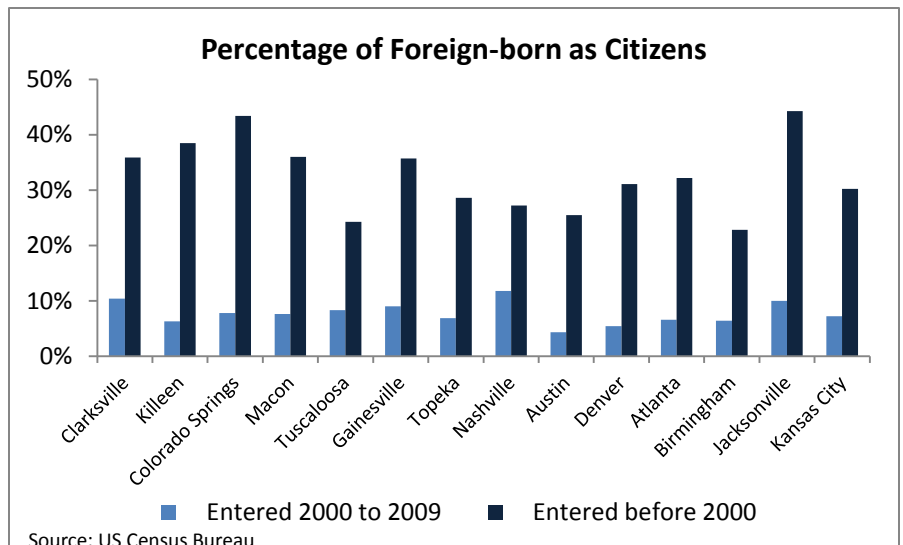
Clarksville	33.1
Tuscaloosa	28.8
Killeen	26.8
Colorado Springs	25.0
Birmingham	23.5
Macon	23.2
Topeka	23.2
Jacksonville	23.1
Atlanta	22.3
Denver	21.8
Kansas City	21.6
Nashville	21.2
Austin	18.7
Gainesville	13.8

Source: US Census Bureau

Immigrant Social Integration

One hallmark of integration of foreign-born residents into a new society is their level of naturalization as citizens. For both the more recent immigrants to Clarksville and those residing longer, levels of citizenship are comparatively high across the set of Joint Metro Regions. Meanwhile, Nashville’s more recent arrivals exhibit higher levels of naturalization. A lower portion of Nashville’s arrivals prior to 2000 are citizens than in many other metro areas.

The characteristics of naturalized citizens themselves form an interesting array of considerations for a society. Citizenship offers many important opportunities for residents to participate fully in the life of their new home. Meanwhile, opportunities to become naturalized are many and varied based on experiences.



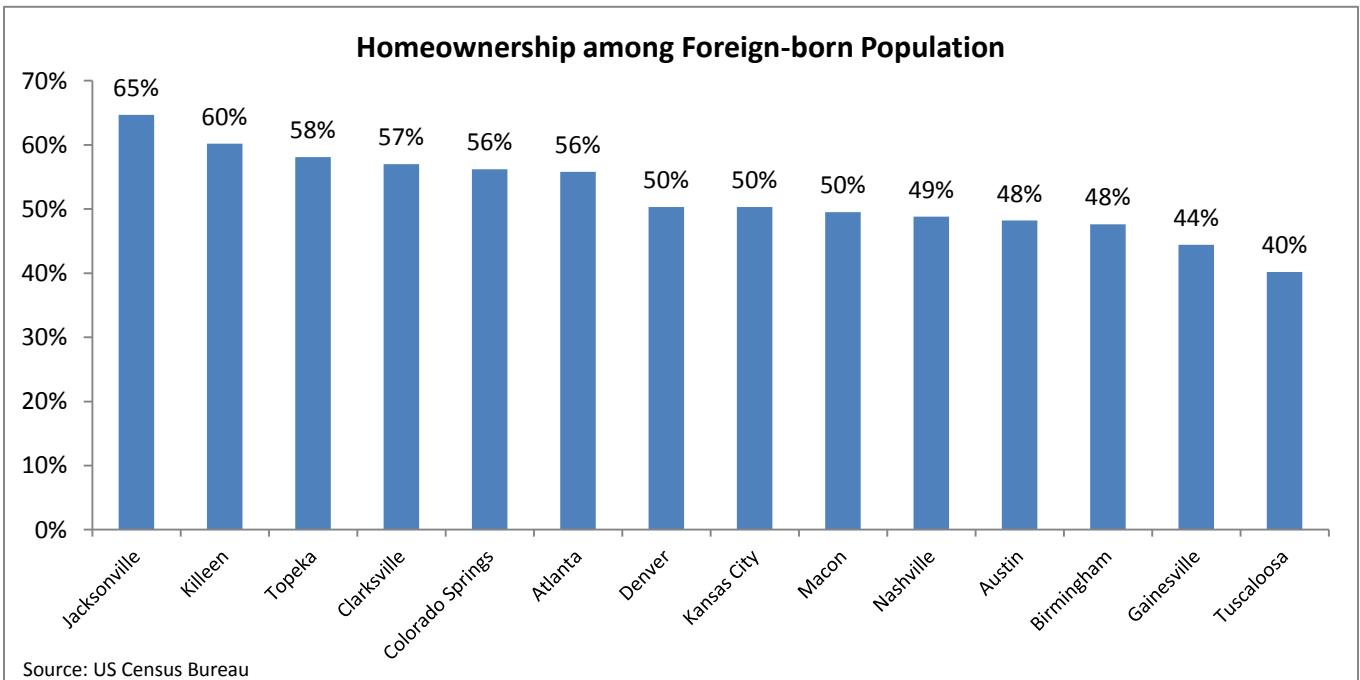
Understanding the full picture of an immigrant community provides important glimpses into why and how any one feature may be more or less prominent. Citizenship levels of immigrants are moderately high in Clarksville compared to other regions and higher than in the Nashville region. Levels of educational attainment, similarly, are comparatively strong in Clarksville. Some metro regions in the set have immigrant populations more attached to their role as home to large institutions of higher learning or other unique facets of a region.

Another measure of foreign-born access into the life of a region's economy historically is their level of homeownership. Immigrant population percentage of homeownership in the Nashville-Clarksville Joint Metro Region shows high levels of home ownership (57%) in Clarksville compared to other benchmark metropolitan areas. Ownership among Nashville's foreign-born is lower (49%) which somewhat trails that of other large MSAs in the comparison set.

Foreign-born Percentage of Household that are Married-couple Households

Clarksville	69.4
Jacksonville	66.7
Colorado Springs	66.5
Denver	65.0
Birmingham	64.7
Killeen	64.0
Atlanta	63.9
Nashville	63.7
Topeka	62.6
Tuscaloosa	62.4
Kansas City	62.1
Austin	61.7
Macon	56.0
Gainesville	48.1

Source: US Census Bureau



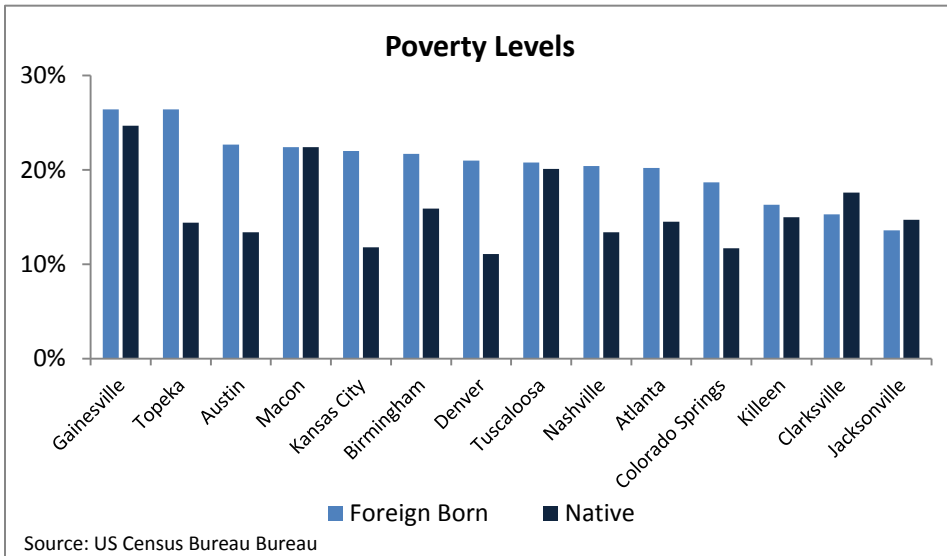
Integration involves many processes and facets of life in a host community. One measure of integration includes rates of marriage among immigrant and native populations. While data is not fully available on that indicator, the presence of foreign-born spouses of military population is one frequent occurrence in areas near installations both for current and retired personnel. Some longstanding international presence in the Clarksville area relates from this phenomenon. International students and scholars across the Joint Metro Region in higher education may present another example. One data series

that does point to the integration and stability of a population involves presence of married-couple households. In this measure, Clarksville heads all others in the comparison for rate of total households that are married-couple households among the foreign-born. It is also one among many areas where the characteristics of foreign-born residents differ somewhat between Clarksville and Nashville.

Lastly, populations living below the poverty threshold contend with many barriers to success in the life and economy of a region. In this regard, foreign-born residents demonstrate higher levels of integration into an area when they gain a foothold into economic mobility and self-sufficiency. Data show that poverty levels among Clarksville’s foreign-born population are much lower than poverty levels in similar communities. However continued attention to the 15% poverty rate among the foreign-born remains a key area to focus on when looking to integrate the population.

Percentage of Foreign-born Who speak English “Less than very well”

Tuscaloosa	57.9
Austin	53.7
Denver	52.5
Birmingham	50.5
Kansas City	48.5
Atlanta	45.4
Topeka	44.2
Nashville	43.4
Killeen	41.7
Macon	40.7
Clarksville	39.0
Colorado Springs	38.7
Jacksonville	36.1
Gainesville	26.7



Many organizations in Clarksville, as in Nashville, specifically focus on the interests and needs of foreign-born population. Below is a list of organizations that are part of the Clarksville Region that promote unique cultural aspects of the community.

Organizations with International Focus in Clarksville MSA

Sister City - Gunpo, South Korea	Hispanic Organization for Progress and Education
Three of Tennessee’s 10 most diverse schools	Model United Nations Organization
APSU Chinese Culture Society	International Student Association APSU
Korean American Association	Japan-America society of Tennessee
Philippine International Association	Edelweiss Club: German American Association

Education and Foreign-born Integration

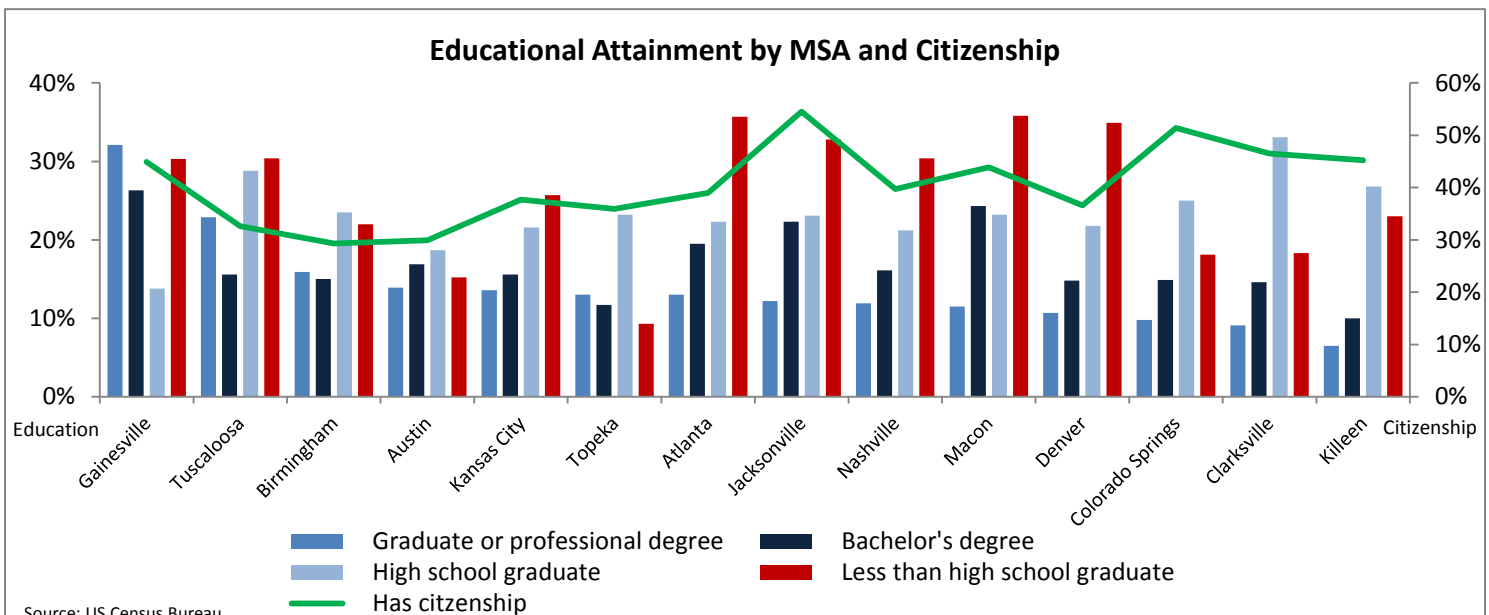
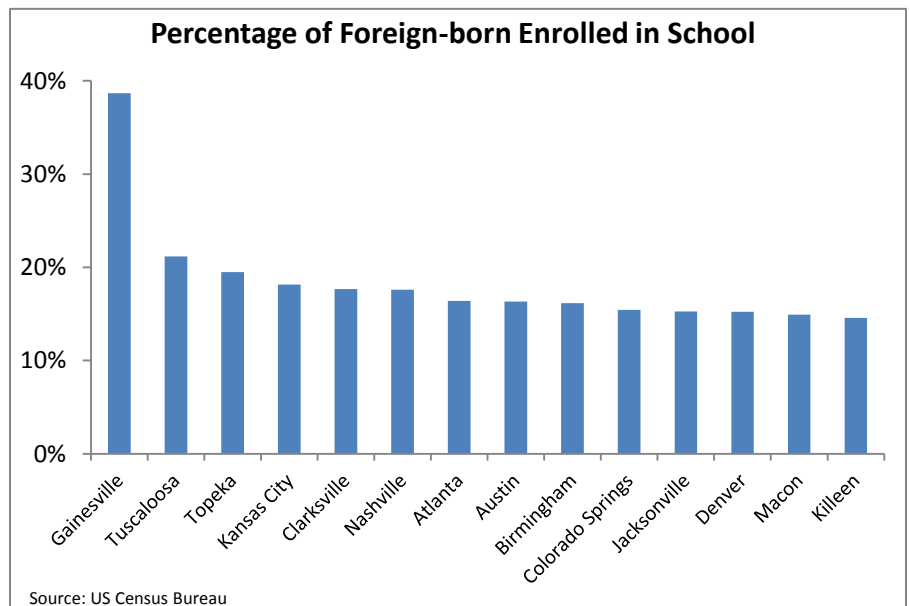
One of the key elements of integration of foreign-born populations is their ability to gain proficiency of a language in a new host country. Access to economic and social mobility attaches to individual's ability to interact with the broader society around employment, education, and a host of services and opportunities. The share of foreign-born that exhibit limitations in English proficiency in Clarksville is lower than many of the comparison Joint Metro Regions

As the immigrant population is more numerous and established in a region, the representation of foreign-born students in schools typically increases. The Nashville region has one of the larger populations of immigrant students while Clarksville's is rather small. However, on a percentage basis the Clarksville share is slightly larger. For a number in the comparison set, the contrast between absolute numbers of foreign-born students enrolled and the share of total enrollment they represent is significant. It is worth noting that there is not a strong correlation across the metros presented between citizenship and college education attainment (.3).

Foreign-born Population 3 years and over Enrolled in School

Atlanta	118,196
Denver	47,410
Austin	42,461
Kansas City	23,285
Nashville	23,119
Jacksonville	16,761
Gainesville	10,543
Birmingham	7,485
Colorado Springs	7,128
Killeen	4,339
Clarksville	2,130
Topeka	1,665
Tuscaloosa	1,528
Macon	1,057

Source: US Census Bureau



International Business and Nashville-Clarksville Joint Metro Region

International business linkages to the Nashville-Clarksville Joint Metro Region are abundant and growing. The levels and types of foreign direct investment across the area are demonstrations of the fundamental business strengths and opportunities that are unique to northern Middle Tennessee. An impressive array of foreign investment has resulted in a “who’s who” of corporate presence in many forms that transcends boundaries in the Joint Metro Region. Further, there is evidence of the presence of industry clusters of substantial size and impact and of firms with multiple facilities that recognize the merits of the Joint Metro Region and have continued to boost investment over many years.

The characteristics of the region- favorable cost of doing business, favorable cost of living, high quality workforce, friendly business climate and many logistical advantages are assets that complement the other unique aspects of this Joint Metro Region on a comparative basis. The significant roles of the military presence, higher education and a highly diversified economy are the assets that have allowed the Clarksville-Nashville Joint Metro Region to even further extend its attractiveness and are those which can provide greater leverage into the future.

A great deal of foreign direct investment has occurred in the Nashville-Clarksville Joint Metro Region over the past two decades. The relationship of numerous corporate investments illustrates the dynamic relationship of industry clusters across the region such as Bridgestone North America and the large transportation equipment sector that has formed a major center in northern Middle Tennessee. Other international presence in the Joint Metro Region represents a wide cross section of the diverse industry comprising the area economy.

Foreign-owned Firms in the Nashville-Clarksville Joint Metro Region

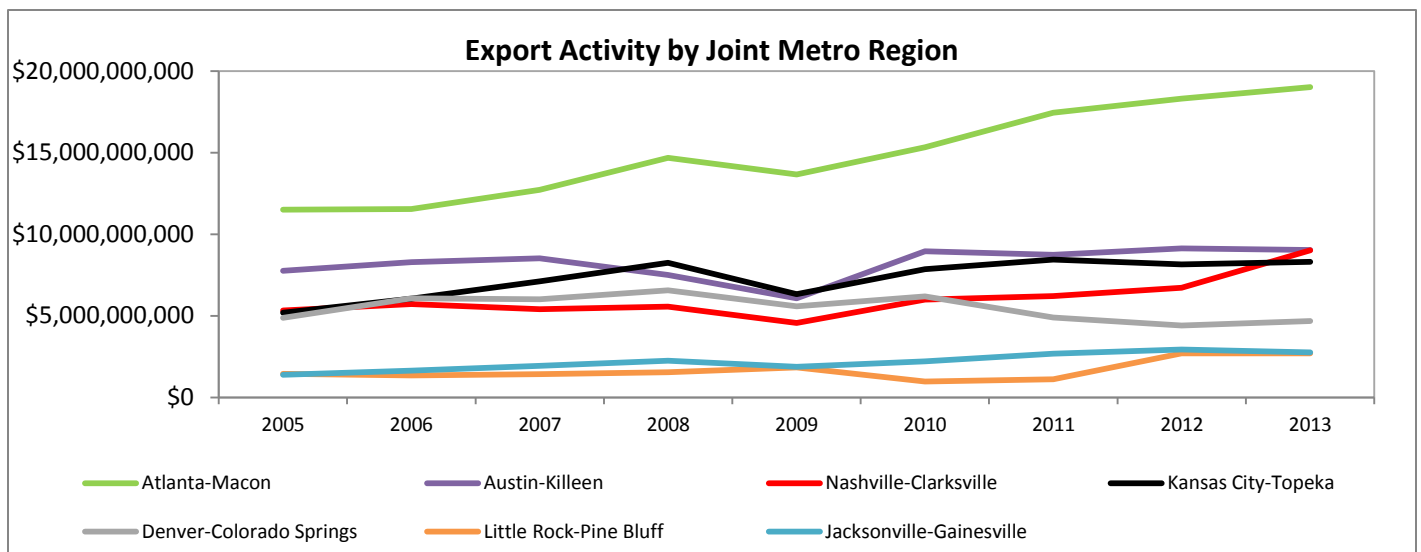
(Clarksville MSA firms in red)

Country	Company
Austria	Agrana Fruit US, SWARCO Industries
Belgium	Magotteaux Corp, Harrington Industrial Plastics, Nyrstar
Brazil	Embraer Aircraft Maintenance, Gerdau Ameristeel, Springs Global US
Canada	ABC Group, BVA Systems, Cinram, Kubra, Martinrea Automotive Systems, Masonite Corp, Medstat Group, Mechanical components of TN, Metrican Sampling, Nortel Networks, PSC Metals, Onward Manufacturing Corp, Prevost Car, Printworks South, Salga Plastics, Shred-It, Sitel Worldwide Corp, Sun Entertainment Corp, Vitran Corp, Xentel
China	Naxos of America, Johnson Electric
Switzerland	Feintool, Franke Contract Group, Kuehne & Nagel, Panalpina, Oerlikon Balzer Coating, WMH Tool Group
Australia	Actus Lend Lease, Pratt Industries, Sims Metal Management, Sims Recycling Solutions
Norway	WWI Vehicle Services
Netherlands	Akzo Nobel Coatings, Corporate Express, Fortune Plastic, Hagemeyer North America, IFCO Systems, Randstad Staffing
Korea	<i>Samick Music Corp, Hankook Tire</i>
Finland	Nokian Tyres

United Kingdom	Ambius, Amec Earth & Environmental, Capitol Records, CEVA Logistics, Commonwealth Brands, ERm-Na Southeast, EMI Business Communications, EMI Christian Music Group, Ferguson Enterprises, Foxboro Company, Fiberweb, GKN Engineering Services, Haynes Manuals, Hayward Baker, Heery International, Hoeganaes Corp, Joseph Decoisimo and Company, Jackson National Life Insurance, Millenium Maxwell House Hotel, Nashville Insty-Prints, PIC North America, Protherics Schrader Electronics, Signature Flight Support Corp, Shawnee Press, United State Cold Storage, Trico Products, Tridow, Willis North America, Yellow Book USA
Italy	<i>Aladdin Temp Rite, Buzzi Unicem USA, Florim USA, Maragoni Tread North America, Rainbow Inc, TCT Stainless Steel</i>
Malaysia	Linatex
Israel	Delek Holdings, Metrolight, Mapco Express
Ireland	Jefferson Smurfit Group, Icon Clinical Research, Irish Express Logistics, Oldcastle Precast, Ingersoll Rand (Trane)
Mexico	Nemak
Luxembourg	Arcelor Mittel Tailored Blanks, Rexel
South Africa	MacSteel Service Centers
Taiwan	KHS America, Quanta Manufacturing
Sweden	<i>Electrolux Home Products, Hexagon Metrology, Permobi, Skanska USA Building</i>
Germany	Bavarian Polymer, Brenntag Mid-South, Henkel Chemical Management, Horn USA, Mahle Filter Systems, Meiko USA, MartinRea Fabco, Perfect Equipment, Robert Bosch Braking System, Siemens Building Technologies, Siemens Electric, Siemens Water Technologies, Windsor Health Croup, Wirtgen America
France	CNA Credit, Kuhn Farm Machinery, Mephisto USA, LaFarge Corp, Meyer Laminates, Nestle Waters North America, Spontex, Southern Optical, Square D, Stuart C Irby, Universal Music Publishing Group, Valeo
Japan	ABMA , Akebon , Advanced Composites, Bridgestone Americas, Bridgestone Metalpha , Bridgestone/Firestone, Carlex Glass America, Clarion Corporation, Daido Corporation, Daiei America, Falken Tire, Fujikura Intl, Holland Group, HoriPro Entertainment Group, Johnson Controls, K & S Wiring Systems, Kagiya Trading Company, Keyence Corp, Konica Minolta, Marubeni-Itochu Steel America, Mayehawa USA, Misa Metal Processing, Metal One America, Mitsuchi Corp, Mitsui and Company, Mitsui Soko Logistics, MKK Technologies, NHK Seating of America, Nissan North America, Nippon Express USA, O-Flex Automotive, Ohashi Technica, Pearl Corp, Ricoh Business Solutions, Sato American Metal, Sompco Japan Insurance, Sony ATV Music, Sony BMC Music, SpanDeck, SteelSummit Holdings, Sumiden Wire Products, Steel Technologies, Sun Chemical T.A. America Corp, Tacle Seating USA, Tennessee Fastening technology Corp, Tokio Marine Management, Toshiba America Consumer Products. U.S.A. Zama, Unipres USA, U.S. Tsubaki, Yamato Transport, Yaduda Fire and Marine Insurance, Yazaki North America

Source: Tennessee Department of Economic and Community Development

The locational advantages of a region are a combination of its natural setting, what infrastructure it has to capitalize on that location, and what goods and services it has to trade with others that can produce a net economic gain for the region. In this regard, the Joint Metro Region performs very well in comparison with other like regions. Export activity offers one example of a strong and growing contribution made by international trade based on the productive output from northern Middle Tennessee that then finds markets throughout the world.



Source: US Department of Commerce

On a relative basis both the Nashville and Clarksville MSA’s exhibit exporting strength as great or greater than many of their respective peers in Joint Metro Regions. As an inland metro area of smaller population size than several others, the Nashville-Clarksville Joint Metro Region exports at very high levels. This again is an attribute of important clusters of goods and services output that can access the infrastructure needed to interact with foreign markets.

Export Activity by MSA (2013)

Atlanta	\$18,827,866,222
Austin	\$8,870,843,552
Nashville	\$8,702,830,825
Kansas City	\$8,012,092,691
Denver	\$3,618,375,859
Little Rock	\$2,497,479,099
Jacksonville	\$2,467,786,307
Birmingham	\$1,865,268,570
Colorado Springs	\$1,065,398,660
Clarksville	\$315,891,247
Topeka	\$303,323,394
Gainesville	\$295,047,761
Pine Bluff	\$205,371,145
Macon	\$190,803,840
Killeen	\$167,383,255

Source: US Department of Commerce

Finally, the linkages of world regions to the products and services shipped and distributed from the Nashville-Clarksville Joint Metro Region present an overall snapshot of the degree of trades and exports to global markets and the relative similarity of destinations that the region operates with. Increasingly, the region finds opportunities to build economic ties that reach into many parts of the world.

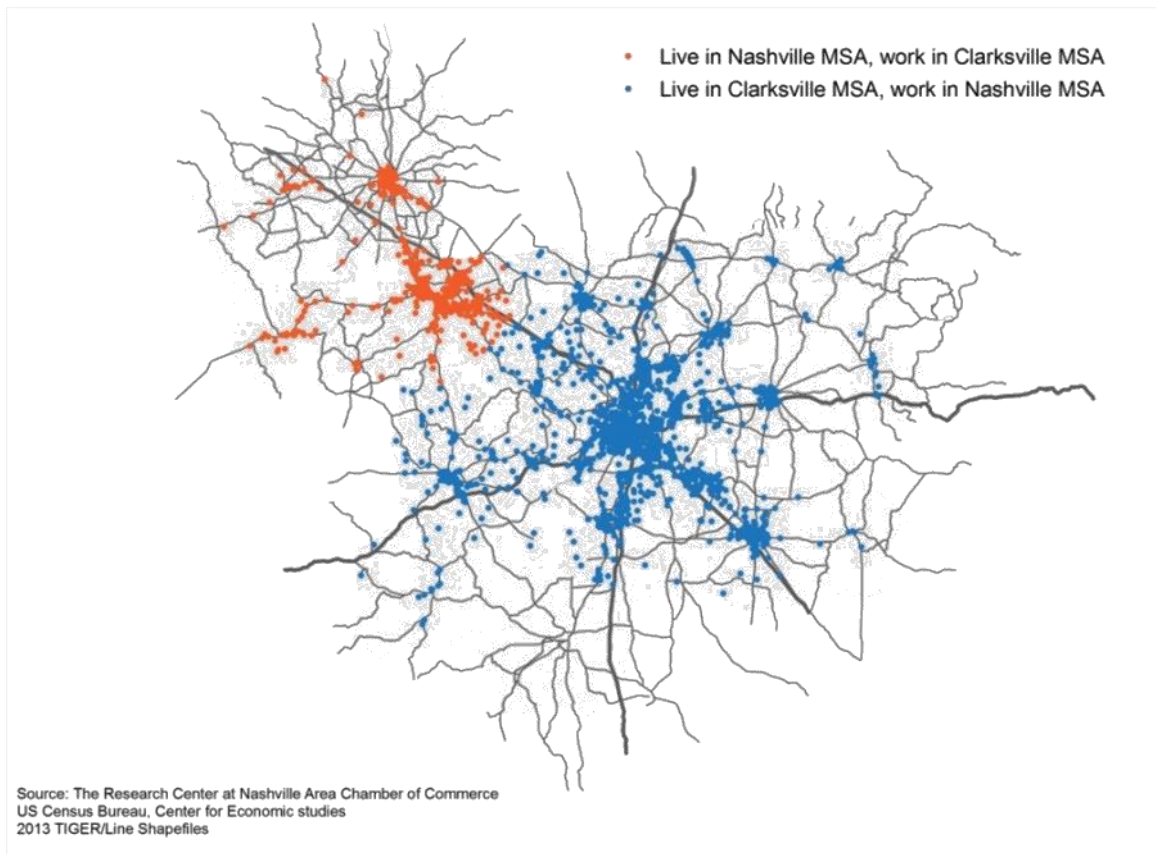
Exports by Destination

Clarksville Origin		Nashville Origin	
Asia-Pacific Econ. Cooperation	\$242,114,315	Asia-Pacific Econ. Cooperation	\$6,649,432,063
NAFTA	\$202,329,356	NAFTA	\$5,146,652,801
EUROPEAN UNION	\$55,153,692	Asia	\$1,101,726,956
Asia	\$37,066,801	OPEC	\$698,333,414
South America	\$12,873,034	EUROPEAN UNION	\$696,182,812
Assn. of Southeast Asian Nations	\$3,283,727	South America	\$430,587,593
CAFTA	\$3,226,402	Assn. of Southeast Asian Nations	\$225,251,359
Africa	\$1,074,684	CAFTA	\$128,214,703
OPEC	\$565,831	Africa	\$35,105,598

Source: US Department of Commerce

Synergies for Nashville – Clarksville Joint Metro Region

The vitality of a region can only be fully understood when it is examined as it functions and as its leadership work to enhance that functionality. The aspects that leverage the mutual interactions of the Clarksville and Nashville metro regions as a Joint Metro Region are clear and compelling. A sharing of innovation, talent, infrastructure and opportunity points to further growth and prosperity in this dynamic area. Continuous economic interaction highlights how the strengths and opportunities of the two metros thrive and grow.





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